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MOST SUCCESSFUL
BUSINESSPEOPLE
BUILD RELATIONSHIPS
AND WIN CLIENTS FOR LIFE

THE CONNECTORS

MARIBETH KUZMESKI

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*To my family, my clients, and my friends who have
taught me to be a better connector.
Acyio!*

INTRODUCTION

They may forget what you said, but they will never forget how you made them feel.

—Carl W. Buehner (1898-1974), Mormon leader,
businessman, and author

I have the great fortune of being able to personally meet some of the most successful sales professionals in the world—some of whom we work with at my marketing consulting firm. I have been long captivated with the “how do they do it” aspect of success in business, as many of us of course are. How do they think? What are their characteristics? What are the similarities among the most successful businesspeople? What consistent actions do they take? What drives them? What has combusted to make them who they are and to produce such exceptional accomplishments?

Interestingly, this same curiosity about what makes others successful is also present in those enjoying current success. The individuals and firms with whom we consult know that we have other profitable businesses with whom we work with on strategy and business development. That is the reason, I believe, that the most frequently asked questions I hear are “What are other firms doing that’s working?” or “What exactly is she doing to bring on so many sales?”

As businesspeople, many of us have a great desire to continue to get better and better, and not get caught being stagnant or too comfortable in our current situation. And, if we can find out what someone else has taken the time to discover and use with success, perhaps we can learn from that and not make mistakes which others have already made and corrected. But if simply knowing and implementing successful tactics in practice by others is the secret to success, then you would think that each proven idea, sales tactic, marketing strategy, or business system would be taken by the masses and turned into extraordinary sales. However, we know that's not how it works.

Therefore, the most profitable businesses and individuals in the world must possess something *unique*. I have spent a lot of time considering their intellectual power, their competitiveness, their determination, their implementation strategies, their staff, their funding options, and just about anything else you can think of that may distinctively contribute to such positive results. When we break down the characteristics that extraordinary businesspeople do possess, much of them are what we may consider to be some of the obvious enviable traits: persistence, drive, hard work, intelligence, ability to generate new ideas, ability to change, a "Never take no for an answer" mindset, and so on.

However, there is one more key characteristic, and it is these individuals' particular ability to connect with others and form meaningful relationships.

This is not as simple as academic intelligence or an entrepreneurial spirit. The ability to connect is a different kind of intelligence, one that is the proverbial icing on the cake for most of the people who have reached to high levels of greatness. And without the icing, the cake probably can't be an incredibly delectable cake; it would be missing a key ingredient. The cake alone may be delicious, but it really only becomes an extraordinary cake with the icing to top it off—assuming it is the right amount and taste of the perfect icing.

This ability to connect with others is indeed the icing on the cake. Relating in an impactful way brings sales, leadership power,

and personal success. It is an innate skill in some, but something that everyone can learn and improve upon. Yet it is truly a secret to success because it is often dismissed. We have a tendency to brush off the importance our ability to connect and create relationships is as a key contributor and explanation for business success.

True connections need to be made with feeling and purpose and honesty. I know because I watch my clients do it every day. I have also spent a great deal of time, research, and energy on working through this very concept myself, applying it in my life, and continuing to work and learn at this most critical element in success. It is something I will always work at and, hopefully, continue to get better at. It is a constant process.

Unfortunately, our ability to connect can be lost in a fraction of the amount of time that it took us to develop it. It seems sometimes that just one setback in our career or plan and—whomp!—we are back to the old “me, me, me” attitude that leaves little room for concern for others. But staying true to others and making a real effort to connect with them will no doubt make their lives better—and ours too. Cultivating relationships undoubtedly leads to success in just about anything that we do. And it is a skill that must be practiced and trained.

The first experience that I had that really differentiated these characteristics of success took place while I was working with a financial advisor and his firm. We were hired to help them improve their marketing strategies and bring on new clients. The principle in the firm, Roch Tranel, measured progress by the amount of client assets they brought under their management at the firm. His goal was to grow into a large financial services firm with hundreds of millions in money under management.

Since I had not worked with a financial services firm prior to this (and thanks to this client, we now we work with hundreds of financial firms each year!), I started by looking at the opportunities that existed and the type of prospecting that may work for attracting clients who would invest their savings with this firm. I asked Tranel how he had acquired clients in the past. Much of his success, interestingly, was rooted in his fear of

prospecting. He didn't want to cold call or employ similar strategies. So, he just kept calling and talking with those who had already done business with his firm. He kept himself busy by avoiding the typical prospecting strategies of reaching people who didn't know him.

The result was unintentional but amazing: His handful of clients *truly* loved him. They cared about his success; they brought him food; they sent birthday cards to his wife and his growing family of kids. And a valuable by-product of this was a stream of referrals. Tranel was only in his 20s, and he had little experience. But because of his drive and determination to stay in business and communicate properly with his few clients, they began to genuinely like and trust him. As a result, his few clients began recommending him to others who worked at the same company.

When I began working for his firm, I knew that prospecting for people that had no connection to Roch Tranel was going to be a long shot based on his propensity for prospecting. So, we simply took his model of communicating and acquiring referrals and made a system out of it. His strength was connecting with others; he just needed to do it more systematically and to more people. And, his staff needed to do the same thing.

Today, The Tranel Financial Group is one of the top financial firms in the United States. They do manage hundreds of millions in client assets. Roch Tranel has given my firm much credit for his quick ascent to success. But in reality, his ability to connect was the one great strength. We built an entire marketing system around that ability and then transferred that ability and connection techniques to his staff, and it multiplied and multiplied.

Is it possible to build an entire, multimillion-dollar business around your ability to connect? It seems so. And it is the best way to build a business effectively, efficiently, profitably, and quickly.

Others firms have seen the kind of success that Roch Tranel and his firm have enjoyed. They have asked me to do just what Roch did in his firm—build a model around the acquisition of referrals. And the model that I have developed is as follows:

1. Delight Clients
2. Acquire Referrals
3. Invite Referrals to Educational Workshops
4. Acquire Clients
5. Repeat Process from #1.

It is actually a very uncomplicated strategy. Systematize your operation around your clients, build niches of clients, put on educational workshops, convert clients, and repeat. We've employed this system with great success in many firms. However, it is not as easily executed as it may appear to be. The key is the very first step: delighted clients. How you get to having a delighted client is much more complex than just sending them a few letters and visiting with them once a year to go over their accounts. It is a process that begins with the learned and cultivated ability to connect.

Connecting with others is not incredibly difficult. But if it were easy, then wouldn't you think that more people would take the time to work harder at connecting with others and developing deeper relationships? It may be that our trust issues or a habit of focus does not necessarily include others. Many businesspeople have established a survival-of-the-fittest-type attitude.

My purpose in writing this book is to share with you what some of the most successful people have done to create better relationships and to show you how this has been the missing link in attempts to be more successful, bring on more new business, and create the kind of client loyalty that will win clients for life. Connecting at a deeper level can be achieved without spending money on consultants, courses, marketing strategies, psychologists, or spiritual consultants. It simply requires that you focus on others and have a plan to serve them, pay attention to them, listen to them, and care about them.

Our research and findings describe what has given successful businesspeople—some you will recognize and others you probably won't—the ability to reach higher levels of achievement than most. Their stories and the principles they use to connect with

others—resulting in unique business accomplishments—fill the pages of this book. It is not their business acumen alone that has brought them to positions of such prominence. The key determinant at the top of all business strategies, talents, and expertise is the ability to connect with people on a meaningful level—one that produces quality associations and profitable business relationships.

In essence, it is how we make others feel within the connections that we have that brings the success we desire.

P A R T

I

Winning Business with Relationships

The Common Denominator of Greatness and Success

It's Not Money, It's People!

We cannot live only for ourselves. A thousand fibers connect us with our fellow men; and among those fibers, as sympathetic threads, our actions run as causes, and they come back to us as effects.

—Herman Melville

Great! It's a word we hear and use often: "Great game!" "Great shot!" "Great work!" "Great movie!" "Great song!" "Great party!" "Great _____ (fill in the blank)!" "How are you feeling today?" "Great!" "What great weather we're having." "The food at that new restaurant in town is great." "We had a great time last night."

4 The Common Denominator of Greatness and Success

And the beat goes on! We use the word “great” in referring to amount, extent, scope, exceptional or praiseworthy accomplishment or performance, or someone who’s widely known and esteemed. The late comedian and actor Jackie Gleason was called “The Great One,” as is former National Hockey League star Wayne Gretzky.

In boxing, being known merely as great wasn’t quite good enough for former Olympic gold medalist and heavyweight champion Muhammad Ali. Never the shy and retiring type, Ali would frequently proclaim himself “The Greatest,” a name his fans quickly adopted in referring to him. On one occasion, however, he said, “I’m not the greatest,” but immediately followed that seemingly humble remark by declaring, “I’m the double greatest.”

In addition to having “great” or “greatest” attached to their names, Gleason, Gretzky, and Ali were certainly very successful in their chosen pursuits, but does that necessarily suggest a correlation between greatness and success? Is every great person successful, and every successful person great? Hardly!

We have great-aunts, great-uncles and great-grandparents, who may or may not always be as great as those names suggest. Nor is “great” always used to describe people. Australia, for example, has its Great Barrier Reef, China its Great Wall, and the United States its Great Lakes and Great Smoky Mountains. And while the word “great” is most often attached to something positive, it can also have negative connotations, as in “The Great Plague” and “The Great Depression.”

So, given the frequency with which we apply the word “great” in so many different ways, how do we go about defining greatness? How can we measure or recognize when it’s been achieved? And what’s the connection between greatness and success?

Secrets of Greatness

In 2006, *Fortune* magazine published a three-part series titled “Secrets of Greatness.” The first part, titled “How I Work,” appeared in its March 20 issue and included interviews with a dozen

men and women labeled “super achievers,” representing various segments of the business and professional spectrum. All these super achievers—most of them quite well known—have been very prosperous in their chosen fields, and so the magazine’s writers set out to find the reasons for their success.

Not surprisingly, most of them get up early and stay up late, getting by on four to six hours of sleep. Proper diet and exercise are also mentioned frequently. Most rely heavily on technology to keep up; for a few, the gadgets are limited to their cell phones. Some are good at multitasking, while others like time alone to think—one does so by standing on his head. Some credit delegation as a key to their success, and for others it’s maintaining a strict to-do list.

The second in the “Secrets of Greatness” series (June 12, 2006) was titled “Teamwork,” and it described how some teams achieved great success, while others failed miserably. In the introductory article, *Fortune* magazine writer Jerry Useem warned that “The fact is, most of what you read about teamwork is bunk,” and what follows are several examples that prove his point.

One of his examples was the 2004 U.S. Men’s Olympic Basketball Team. Prior to that time, American teams had won gold medals in 12 of 14 Olympiads, with an overall record of 117 victories and only two losses, dating back to 1936. Unfortunately, the 2004 group was assembled at the last minute, lost three times (more than in all previous Olympiads combined), and won only a bronze medal.

What had gone wrong? What was the missing ingredient? The players themselves were as talented as their predecessors. But instead of a team, it was simply a collection of individuals who hadn’t been given the time to develop relationships, to connect to one another, and play together. It was a “team” in name only.

For USA Basketball officials, it was a hard-learned lesson, and a mistake they wouldn’t repeat. The players for 2008 were chosen early and, given the opportunity to build the relationships so essential for team *work*, won all eight of their Olympic contests and the gold medal.

6 The Common Denominator of Greatness and Success

The last in the *Fortune* series (October 30, 2006) was titled “What It Takes to Be Great,” profiling an all-star cast from the worlds of manufacturing, retailing, sports, entertainment, and high tech. In summarizing the magazine’s findings, Geoffrey Colvin writes, “The good news is that your lack of a natural gift is irrelevant—talent has little or nothing to do with greatness . . . greatness isn’t handed to anyone; it requires a lot of hard work.”

Admittedly, this is a rather broad-brush overview of this “Secrets of Greatness” series in a major business magazine, but what I found most surprising was the complete lack of anything surprising. There were no great secrets revealed. These highly successful men and women do what successful people have always done.

Take out the references to email, BlackBerrys, laptops, cell phones, and other modern day conveniences, and there’d probably be little difference between these articles, written in 2006, and any secrets of success articles written hundreds—or even thousands—of years earlier.

What *was* surprising, however, was that among the many successful people profiled, greatness was something that was primarily inferred, rather than conferred. I found it difficult, however, to escape the conclusion—or at least the implication—that in achieving success one automatically dons the mantle of greatness.

Certainly, greatness can never be self-conferred, nor did any of the men and women profiled by *Fortune* even hint at it. To the contrary, as we’ll soon see, many of their stories contain an underlying theme—a common ingredient—that enabled them to ascend the ladder of success and, perhaps, greatness.

A Different View

In his newest book, *Outliers: The Story of Success*, internationally best-selling author Malcolm Gladwell (*The Tipping Point* and *Blink*) echoes the importance of hard work in order to be successful. “The people at the very top don’t work just harder or even much harder than everyone else,” he writes. “They work much, *much* harder.”

While the *Fortune* writers and Gladwell agree on the importance of hard work as a key to success, there are significant differences in their overall studies of what it takes to get there. For example, while the former series features numerous profiles of organizations and individuals in a wide range of activities, Gladwell takes a much different approach.

Gladwell, referring to *Outliers*, said, “The premise of this book is that you can learn a lot more about success by looking around at the successful person, at what culture they belong to, what their parents did for a living. Successful people are people who have made the most of a series of gifts that have been given to them by their culture or their history, by their generation.”

For example, his research indicates that in some cases, the year—or even the month—a person was born is key. “The culture we belong to,” he writes in *Outliers*, “and the legacies passed down by our forebears shape the patterns of our achievement in ways we cannot begin to imagine.”

While Gladwell makes a convincing case for the importance of generation, family, culture, and class to become successful, his exhaustive research also led him to this conclusion: “No one—not rock stars, not professional athletes, not software billionaires, and not even geniuses—ever makes it alone.”

An Underlying Thread

While there was no major focus on relationships in the *Fortune* series, a careful reading of the articles reveals a thread of connectedness, of relying on others, running through many of them. For example, the opening story, about Thomas Edison, begins with this statement: “He did his best work after dark.” The story goes on to describe the inventor’s all-night work sessions, quoting him as saying: “I owe my success to the fact that I never had a clock in my workroom.”

But Edison didn’t spend those long nights in isolated labor. According to this article, “the inventor would push himself and his dozen-plus researchers until dawn.” Clearly not a lone ranger,

Edison once explained what it was that drove him: “I never perfected an invention that I did not think about in terms of the service it might give others. I find out what the world needs, then I proceed to invent.”

Carlos Ghosn, CEO of both France’s Renault and Japan’s Nissan, spends much of his time flying to his offices, not just in three different countries—Japan, France, and the United States—but on three separate continents! Maintaining such a demanding schedule while handling enormous responsibilities would be all but impossible were it not for the bilingual assistants he has in each office. Yet Ghosn refuses to let his heavy work schedule disrupt his connectedness to his family. He told *Fortune*, “I do not bring my work home. I play with my four children and spend time with my family on weekends.”

Amy W. Schulman, a partner in DLA Piper, a global law firm with offices all across the United States and in nearly two dozen other countries, told *Fortune*, “There isn’t anybody on my team I don’t trust 100%. Remember, I’ve been building this team for ten years.”

James McNerney held top leadership positions at General Electric and then 3M before joining The Boeing Company, where he serves as chairman and CEO. Asked about his leadership philosophy, he told *Fortune*, “I start with people’s growth . . . in terms of helping others get better.”

A look behind the scenes at Boeing clearly demonstrates just how much emphasis the company places on people’s growth, on building relationships, and developing the company’s future leaders. One example is the Boeing Leadership Center (BLC), housed on a 286-acre campus near St. Louis. The stated goal of the BLC is “to allow leaders, from first-line managers to senior executives, to share what they’re doing and what they’re learning, as well as exchange techniques and best practices.” A key part of the BLC is its Leaders Teaching Leaders (LTL) process, in which Boeing executives from all across the company share their expertise with participants in a format which encourages open discussion, questions and challenges. The program’s ultimate goal is to build the company’s leaders of tomorrow.

After her participation in the LTL program, one executive, Ginger Barnes, vice president, Weapons Programs, summed it up well. “Leadership,” she said, “is all about leaders teaching leaders and about relationships.”

There’s that “R” word again—relationships! Regardless of the field—politics, sports, music, high tech, military, science, law, manufacturing, merchandising—the importance of relationships, of connectivity, is expressed again and again.

Where Greatness Lies

Once again, I pose the question I asked earlier: How do we define greatness? Surely, it can’t be measured simply by how much money we have in the bank, by the size or success of the organizations we run, or by the size of our investment portfolios. And the awards and accolades we have displayed on our walls, no matter how many, don’t proclaim our greatness.

Is success an accurate gauge of greatness? I don’t think so. The pages of history are filled with the stories of men and women who enjoyed great success in their chosen fields of endeavor, yet for one reason or another never achieved greatness. Often, their success came at the expense of those they elbowed aside or climbed over, in their relentless efforts to reach the top rung of the ladder.

The Preacher and the Pitcher

Based on my experience—and on the hundreds of definitions and opinions I’ve gathered in my research on success—there’s one ingredient that stands out in my mind as capturing its true meaning. Many of the men or women in articles and books on success make some reference to it, and Gladwell hit the nail on the head, but there are a couple of stories that illustrate it well. They’re not about any business titans or captains of industry, but by a baseball player and a minister.

William Booth was an itinerant preacher walking the streets of London in 1865, bringing a message of hope to homeless men and

women. From that modest beginning, the organization he founded, The Salvation Army, has now spread to more than 100 countries, and is generally acknowledged as perhaps the finest, best run, and most respected and successful organization of its kind in the world. And it was Booth who was able to distill this essential ingredient of greatness and success into a single word.

One Christmas, General Booth wished to send a Christmas greeting to his troops who, by then, were scattered in more than 50 countries around the world, encouraging them to continue serving the hurting and the needy. At that time, the only means of rapid communication was by telegram, which was expensive, with costs based on the number of words used. A practical and frugal man, General Booth found a single word to convey his message. His Christmas telegram read, simply: "Others."

The ballplayer's career ended more than 60 years ago, but what a career it was. A left-handed pitcher, who was later elected to the Baseball Hall of Fame, he helped the New York Yankees win seven American League championships and five World Series. He won more than 20 games in each of four seasons, was the winning pitcher in three All-Star games, and had a record of six wins and no losses in World Series games.

Yet, he never let his success get the better of him. A zany and colorful character, his antics and his sense of humor had earned him the nickname of "El Goofy." Once, when asked what had made him so successful, Vernon "Lefty" Gomez replied, "The secret of my success was clean living—and a fast outfield."

It was the kind of humorous comment for which he was famous, but perhaps without realizing it, he revealed a key ingredient in what distinguishes greatness from success: giving credit to others! Incidentally, during much of Gomez' outstanding career, the star of that "fast outfield" he gave credit to was the incomparable Joe DiMaggio.

Gomez' record is indisputable evidence of his success in his chosen field. But it was crediting others for that success that was a mark of his greatness. While success can be achieved without greatness, I'm convinced that everyone who earns the mantle of greatness has indeed reached the pinnacle of success.

Of course, one doesn't have to search the annals of business very deeply to uncover many examples of men and women who achieved greatness because of their concern for others.

A Business Philosophy Called PSP

It's a story that has taken on legendary proportions in the annals of business. It began with a term paper written in 1962 by a Yale freshman majoring in economics who had an idea for a new method and system for overnight package delivery. But it would be several more years before Frederick W. "Fred" Smith could act on that idea.

After graduating from Yale in 1966, Smith joined the Marine Corps, serving two tours in Vietnam, earning the Silver Star, Bronze Star, and two Purple Hearts. In 1969, he was honorably discharged with the rank of Captain. Two years later, he founded Federal Express (later changed to FedEx). The first few years were difficult ones, but the young company turned the corner in 1976, its first profitable year.

Today, FedEx operates in more than 200 countries, with a workforce of more than 290,000 employees and contractors and annual revenues approaching \$40 billion. Asked in a 1998 interview with The Academy of Achievement for the primary reason for such phenomenal success, Smith explained: "First and foremost is our corporate philosophy, which we call PSP: People, Service, Profit. If you're going to run a high service organization, you have to get the commitment of the people working for that organization right at the start."

Smith credits his Marine Corps service for teaching him about leading people and building relationships with them. In that same interview, he said, "there we were, out in the countryside in Vietnam, living together, eating together and obviously going through all sorts of things. I think I came up with a very, very different perspective than most people that end up in senior management positions about what people who wear blue collars think about things and how they react to things, and what you should do to try to be fair."

It occurred to me that Fred Smith's brief but powerful PSP philosophy covers all the building blocks of sound business relationships, and could easily and accurately be translated into another acronym: ECS—Employees (People), Service (Customers), Shareholders (Profit).

Champion of the “Little People”

Amadeo was born in 1870 in San Jose, California, the son of Italian immigrants. He was only seven when his father died. After his mother remarried, he quit school at age 14 to join his stepfather in the produce business. Five years later, he had become a full partner and, at age 31, he sold his interest in the thriving business to his employees.

Then, the now wealthy young man was invited to serve on the board of directors of a local savings and loan company. Before long, however, he became frustrated by its unwillingness to extend credit to the small businessmen and merchants in the area, many of them hard-working immigrants and other “little people” that Amadeo had come to know and respect during his years in the produce business.

Determined to help them, he decided to open a bank of his own, one that would serve the needs of all the people. So it was that, in 1904, 34-year-old Amadeo, better known as A.P. Giannini, opened the Bank of Italy, with the initial capital of \$150,000 coming largely from his stepfather and some friends who knew him as a man of unswerving integrity. Later, as the bank grew and prospered, its name was changed to Bank of America.

Two years later, the great San Francisco earthquake and fire left the city in ruins, and the majority of the city's bankers planned to keep their doors closed for six months, allowing them time to rebuild. But Giannini would have none of it. Almost immediately, on a waterfront wharf, he used a plank supported by two wooden barrels as a makeshift desk and was back in business, making loans with no more collateral than a handshake.

Giannini was a true visionary. Determined to have a “democratic bank” serving the needs of everyone, poor and wealthy, he